

WHAT IS CLAIMED IS:

1. A method for summarizing and reporting stock options values, the method comprising:

storing client account data in a database, wherein the client account data includes at least one set of stock options, and wherein each set of stock options is associated with a position name;

determining a vested options value for each of the at least one stored sets of stock options contained in the stored client account data;

determining an unvested options value for each of the at least one stored sets of stock options contained in the stored client account data;

generating an aggregated benefits report which includes the vested options value and the unvested options value for each of the at least one stored sets of stock options; and

outputting the aggregated benefits report to a client terminal using a communications network in response to a request received from the client terminal.

2. The method of claim 1, wherein the method further comprises:

obtaining investment account data from at least one external account provider using a communications link;

associating the investment account data with the client account data stored in the database; and

storing the investment account data in the database as client account data such that the investment account data obtained from external sources is included in the aggregated benefits report.

3. The method of claim 2, wherein the method further comprises:

determining an estimated position value for each of the at least one stored set of stock options;

generating an investment position report which includes the estimated position value for each of the at least one stored sets of stock options; and

outputting the investment position report to a client terminal via a communications network in response to a request received from the client terminal.

4. The method of claim 3, wherein at least one set of stock options includes a set of stock options associated with an employee stock purchase plan.

5. The method of claim 4, wherein the benefits information includes 401K information.

6. A method for summarizing and reporting benefits information, the method comprising:

storing client account data in a database, wherein the client account data includes at least one set of benefits information, and wherein the benefits information includes at least one set of stock options;

determining a vested options value for each of the at least one stored sets of stock options;

determining an unvested options value for each of the at least one stored sets of stock options;

determining a total vested benefits value based on the vested value of each of at least one stored sets of benefits information, wherein the total vested benefits value includes the vested options value;

determining a total unvested benefits value based on the unvested value of each of at least one stored sets of benefits information, wherein the total unvested benefits value includes the unvested options value;

generating an aggregated benefits report which includes the vested options value and the unvested options value for each of the at least one stored sets of stock options, as well as the total vested benefits value and the total unvested benefits value; and

outputting the aggregated benefits report to a client terminal via a communications network in response to a request received from the client terminal.

7. A data aggregation system configured to determine and report the value of at least one set of stock options, the system comprising:

a database containing client account data, the client account data including at least one set of stock options;

a database server operably coupled to the database and configured to retrieve and store the client account data in accordance with a sequence of programmed instructions;

a web server operably coupled to the database server, wherein the web server has a communications interface to at least one communications network, wherein the web server is configured to calculate a vested options value and an unvested options value for at least one set of stock options stored using the client account data, and wherein the web server is configured to generate at least one report including the stock options value;

an application server operably coupled to the web server and the database server,  
wherein the application server has an interface to the at least one communications network;  
at least one client terminal coupled to the web server via the communications network,  
wherein the client terminal is configured to access the at least one report from the web server.

8. The data aggregation system of claim 7, wherein the client terminal is a personal computer configured for requesting and receiving interactive pages.

9. The data aggregation system of claim 7, wherein the client terminal is a personal digital assistant configured for requesting and receiving interactive pages.

10. The data aggregation system of claim 7, wherein the client terminal is a wireless terminal configured for receiving interactive pages.

11. A computer-readable medium upon which is embodied a set of programmed instructions that cause one or more processors to perform a sequence of operations, the operations comprising:

obtaining investment account data from at least one external account provider using a communications link;

storing client account data in a database, wherein the client account data includes the investment account data, wherein the client account data includes at least one set of stock options, and wherein each set of stock options is associated with a position name;

determining a vested options value for each of the at least one stored sets of stock options contained in the stored client account data;

determining an unvested options value for each of the at least one stored sets of stock options contained in the stored client account data;

generating an aggregated benefits report which includes the vested options value and the unvested options value for each of the at least one stored sets of stock options; and

outputting the aggregated benefits report to a client terminal using a communications network in response to a request received from the client terminal.

12. A data aggregation system configured to determine and report the value of at least one set of stock options, the system comprising:

storage means for storing client account data, the client account data including at least one set of stock options;

a database server operably coupled to the storage means and configured to retrieve and store the client account data in accordance with a sequence of programmed instructions;

a web server operably coupled to the database server, wherein the web server has a communications interface to at least one communications network, wherein the web server is configured to calculate a vested options value and an unvested options value for at least one set of stock options stored using the client account data, and wherein the web server is configured to generate at least one report including the stock options value;

an application server operably coupled to the web server and the database server, wherein the application server has an interface to the at least one communications network;

reporting means coupled to the web server via the communications network and configured to access the at least one report from the web server.

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